



COUNTY OF SAN DIEGO

**Great Government Through the General Management System – Quality, Timeliness, Value**  
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

RETIREMENT ANALYST

Class No. 007548

■ CLASSIFICATION PURPOSE

To assist senior management in the San Diego County Employees Retirement Association (SDCERA) with budget preparation, fiscal management, business operations functional analysis, strategic planning, and/or personnel; and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

Retirement Analyst is a professional journey-level class allocated only to the San Diego County Employee Retirement Association. Under general supervision, incumbents perform administrative duties and provide high-level support to senior management of SDCERA, including monitoring compliance with legislative provisions, reviewing legislative initiatives, gather and analyzing data, develop financial/budget reports, provide personnel information to employees, applicants and management, plan and implement training programs and may supervise clerical, technical, and/or professional personnel. Incumbents are responsible for handling confidential retirement personnel and/or employment transactions.

■ FUNCTIONS

**The examples of essential functions listed in the class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.**

PERSONNEL OPTION

Essential Functions:

1. Consults and advises management on personnel matters.
2. Assists in writing classification specifications specifically for SDCERA.
3. Assists with preparation of recruitment and selection strategies and materials.
4. Reviews applications and interviews candidates.
5. Reviews personnel and payroll transactions.
6. Conducts investigations and makes recommendations based on findings.
7. Compiles, interprets, and analyzes information and statistical data.
8. Interprets, and assists in establishing rules, policies, and procedures.
9. Provides testimony at Civil Service hearings as required.
10. Prepares correspondence and reports.
11. Maintains accurate records, logs, and files.
12. Plans, designs, and presents employee training programs.
13. Provides courteous, high quality service to members of the public by personally responding to requests for service or making appropriate referral.

## ADMINISTRATIVE OPTION

### Essential Functions:

1. Assists in the development of SDCERA's strategic plan and the detailed budget for the plan.
2. Develops detailed project plan schedules for the implementation and management of strategic plan initiatives.
3. Assists in the development and tracking of the SDCERA budget.
4. Monitors the development of SDCERA strategic plan and key performance measures.
5. Assists in the analysis and preparation of cost-benefit analyses.
6. Conducts special projects, and develops reports and recommendations.
7. Coordinates the implementation of project plan milestones and assists in the preparation of documents for the monitoring of SDCERA Board policies.
8. Provides assistance to the Retirement Chief Executive Officer in the development of ad hoc Board of Retirement reports.
9. Collects, analyzes, and provides benchmark benefit administration information.
10. Prepares monthly statistical reports.
11. Reviews legislative initiatives and prepares position papers.
12. Provides courteous, high quality service to members of the public by personally responding to requests for service or making appropriate referral.

## OPERATIONS OPTION

### Essential Functions:

1. Performs special projects such as statistical analysis and prepares reports.
2. Studies and recommends application programming enhancements to the retirement administration system.
3. Develops techniques for measuring cost effectiveness and outcomes.
4. Provides analytical support to the Director and Assistant Director of Member Services.
5. Supports the operational needs of the Member Services group.
6. Conducts special studies, which require research and evaluation of department operations.
7. Monitors effectiveness of policies and procedures and makes revisions or recommendations for improvement as appropriate.
8. Serves as project leader to design and structure new programs and improve existing operations and member services.
9. Engages in problem solving to identify operational, user, and functional, system errors and designs and implements solutions.
10. Consults with Member Services and various specialists regarding program modification and processing as well as data correction and/or restoration.
11. Provides a functional threading role by ensuring coordination of business operations and engaging cooperation between internal divisions and external organizations to deliver services.
12. Lead special projects or assignments and meetings.
13. Identifies and analyzes operational and functional problems, and designs and implements solutions.

## ■ KNOWLEDGE, SKILLS AND ABILITIES

### Knowledge of:

The following apply to all program areas:

- Public personnel management principles and practices.
- Organizational structure, rules, policies and procedures of San Diego County Employees Retirement Association.
- Data collection and analysis methods.
- Telephone, office, and online etiquette.
- Modern office practices including information management and technology.
- Business English.
- County customer service objectives and strategies.

### Personnel Option (in addition to the above):

- Principles, applications, and theories of effective personnel management.
- Recruitment methods.
- Labor relations practices.
- Training assessment and evaluation.
- Classification principles and practices.
- Merit system principles and practices.
- Equal Employment Opportunity and American with Disabilities Act regulations and guidelines.
- Mandates affecting employees including EEOC, and NLRB rules and regulations.

### Administration Option (in addition to the above):

- Strategic planning.
- Basic budgetary principles and practices.
- Mathematics, statistics, and statistical analysis.
- Report writing techniques.
- Research methodology for the analysis of a variety of complex data.

### Operations Option (in addition to the above):

- Retirement plan administration.
- Basic information technology systems.
- Cost/benefit analysis.
- Monitoring and control techniques.
- Statistical sampling.
- Operational analysis and internal control systems.
- Process improvement methodologies.
- Benchmarking techniques.
- Audit reconciliation processes.

### Skills and Abilities to:

The following apply to all program areas:

- Interpret rules, regulations, and guidelines.
- Understand the impact and political implication of decisions and recommendations.
- Establish and maintain effective working relationships with personnel, management, and the public.
- Communicate effectively both orally and in writing.
- Explain policies, and procedures relating to a variety of personnel issues.
- Operate and use modern office equipment including personal computers, copiers, and calculators.
- Supervise, train and evaluate clerical, technical and/or paraprofessional staff.
- Prioritize work to meet established deadlines.
- Use word processing, spreadsheet, electronic mail, and other computer applications.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in adverse situations, which require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

### Personnel Option (in addition to the above):

- Prepare and implement employee-training programs.
- Analyze personnel problems and recommend practical solutions.

Administrative Option (in addition to the above):

- Prepare project plans, schedules, and milestones.
- Read, understand, and develop financial and statistical reports.
- Extract data from information systems.
- Interpret, apply, and evaluate legislation.
- Compile and summarize complex statistical, financial, and other data.

Operations Option (in addition to the above):

- Perform cost/benefit analysis.
- Conduct operational analysis and quality control.
- Compile, organize, analyze and interpret data.
- Utilize analytical, mathematical, and technical, skills to recognize and solve problems or interpret information, policy, and procedures.
- Prepare written reports, summaries, manuals, analyses, and displays of information.
- Perform project delivery analysis.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. An example of qualifying education/experience is: A bachelor's degree in public administration, business administration, economics, finance, accounting, industrial/organizational psychology, information technology or a closely related field, AND three (3) years of professional experience performing budget, statistical analysis, fiscal planning, policy and procedures interpretation, legislative analysis, general administration, retirement plan administration or personnel.

**Notes:** For the Personnel option, experience must have included one (1) year of employee development/training.

For the Operations option, experience must have included one (1) year of designing and documenting functional business processes.

Additional years of experience as described above may be substituted for the educational requirement on a year-for-year basis. A Master's degree in public, business administration, economics, finance, accounting, or a closely related field may substitute for one (1) year of the required experience.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

**The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.**

Continuous upward and downward flexion of the neck. Frequent: standing, sitting, bending and stooping, twisting of waist, side-to-side turning of neck; fine finger dexterity to operate keyboards and writing materials. Occasional: grasping, pushing, pulling and reaching above and below shoulder level; and lift and/or carry up to 10 pounds.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own personal vehicle.

Certification/Registration

None required.

Working Conditions

Office environment; exposure to computer screens.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

**New: July 28, 2000**  
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**Retitle: April 29, 2005 (From: Retirement Personnel Analyst)**  
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Retirement Analyst (Class No. 007548)

Union Code: CEM

Variable Entry: Y